

Leicestershire County Council Local Aggregate Assessment



Data covering the period 1/1/2021 to 31/12/2021. Published – October 2022



Table of Contents

1.	Executive Summary	2
2.	Introduction	6
3.	Types of aggregate produced in Leicestershire	7
	Sand and Gravel	7
	Igneous Rock	8
	Limestone	8
4.	Current situation regarding land won aggregates in Leicestershire	8
	Introduction	8
	Land-won sand and gravel	9
	Sales	9
	Landbank	10
	Production Capacity	10
	Exports and imports	12
	Crushed Rock – Production Sites (active and inactive)	14
	Sales	15
	Landbank	19
	Production Capacity	19
	Exports and imports	22
5.	Recycled/Secondary Aggregate	23
6.	Future Provision	27
	Sub regional apportionment	27
	Comment on providing a landbank	28
	Recent trends	29
	Local Factors	29
	Conclusion	33
	Sand and Gravel Provision	34
	Crushed Rock Provision	35

1.0 Executive Summary

- 1.1. The National Planning Policy Framework (NPPF) requires Mineral Planning Authorities (MPAs) to plan for a steady and adequate supply of aggregates by preparing a Local Aggregates Assessment (LAA). The LAA is required to forecast the demand for aggregates based on average 10 years' sales data and other relevant local information; analyse all aggregate supply options and; assess the balance between demand and supply.
- 1.2. Planning Policy Guidance states that MPAs should also look at average sales over the last three years in particular to identify the general trend of demand as part of the consideration of whether it might be appropriate to increase supply.
- 1.3. This is the tenth LAA for Leicestershire which includes the most recent (2021) aggregate sales and reserves data for the County. The 10-year period covered by this LAA is 2012 up to 2021. Summary sales figures for the period 01/01/2021 – 31/12/2021 are displayed in Table 1 below. The main facts and figures from the report (by aggregate type) are set out below.
- 1.4. In the year 2021 Leicestershire had three active sand and gravel quarries, which had a total potential production capacity of around 1.25 million tonnes per annum. The average sales for sand and gravel for the most recent 10-year rolling period (2012 – 2021), and most recent three-year rolling period (2019 – 2021), are 1.17 Mtpa (million tonnes per annum) and 0.89 Mtpa respectively. Sales in 2021 were 0.73 million tonnes, which was an 107% increase on sales observed in 2020. Estimated permitted reserves on 31st December 2021 were 2.53 million tonnes. This will provide sufficient reserves for 2.2 years, based on average sales over the 10-year rolling period (2012-2021).
- 1.5. Leicestershire currently has four active igneous rock quarries, all of which are rail-linked, together with two active limestone quarries. These quarries have a total potential production capacity of around 15.5 million tonnes. The average sales for crushed rock for the most recent 10-year rolling period (2012 – 2021), and most recent three-year rolling period (2019 – 2021), are 12.94 Mtpa and 12.29 Mtpa respectively. Sales of crushed rock within the County in 2021 were 12.28 million tonnes, which were 114% higher than sales observed in 2020. Estimated permitted reserves on 31st December 2021 were 312 million tonnes. Based on the 10-year provision rate (Table 14), there are currently sufficient permitted reserves for 24.1 years. This is more than sufficient to maintain the Government's requirement for a landbank of at least ten years.
- 1.6. There are 17 operational construction and demolition (C&D) recycling sites within Leicestershire. The total capacity of these sites is estimated to be around 860,000 tonnes. There are currently no industrial processes in Leicestershire which are known to produce 'secondary' aggregates.
- 1.7. After considering local factors, national growth projections and recent production levels, it has been concluded that the calculation of landbanks should continue to be based on the rolling 10-year average sales. The production guideline identified by this Local Aggregates Assessment is 1.17 million tonnes per annum for sand

and gravel and 12.94 million tonnes per annum for crushed rock (See Tables 13 and 14). There will be a potential shortfall of sand and gravel reserves within Leicestershire over the period to 2031 of some 10.56 million tonnes based on the production guideline. The Leicestershire Minerals and Waste Local Plan (up to 2031) which was adopted on the 25th September 2019 allows for additional provision to be made from unallocated areas and extensions to existing sites, provided certain criteria are met. In 2019 a planning application was submitted for the extraction of 3.3 million tonnes of sand and gravel at Lockington Quarry; this application remains undetermined at present. Additionally, although outside of the reporting period for this LAA, a planning application has been submitted for the extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry. There are sufficient permitted crushed rock reserves to meet requirements up to 2031.

Table 1. Summary sales figures for the period 01/01/2021 – 31/12/2021

	2021 Sales (million tonnes)	10-year Sales Average (million tonnes)	3-year Sales Average (million tonnes)	Change in sales (since 2020)	LAA calculated annual requirement (million tonnes)	Permitted Reserves (million tonnes)	Landbank (in remaining years)	Theoretical Capacity (million tonnes per annum)	Comments
Sand and gravel	0.73	1.17	0.89	↑	1.17	2.53	2.2	1.59	Sales were up 107% than those in 2020. They were lower than the 10-year and 3-year sales averages.
Crushed rock	12.28	12.94	12.29	↑	12.94	312	24.1	15.5 (excluding inactive sites)	Sales were up 114% than those experienced in 2020. They were lower than the 10-year and 3-

									year sales average.
Recycled & secondary aggregate	No data available	No data available	No data available	No data available	N/A	N/A	N/A	0.86	Data requested from operators, information not provided (see later text)

2. Introduction

- 2.1. The supply of land-won aggregate in England is based on the national Managed Aggregate Supply System (MASS) which seeks, through Government guidance, to ensure a steady and adequate supply of aggregates; handling the significant geographical imbalances in the occurrence of minerals and the areas where they are most needed.
- 2.2. The National Planning Policy Framework 2021 (NPPF) requires an annual Local Aggregate Assessment (LAA) to be produced by Mineral Planning Authorities to plan for a steady and adequate supply of aggregates. Aggregates are materials used in the construction industry for building purposes, including asphalt and concrete.
- 2.3. According to the requirements of the National Planning Policy Framework (NPPF), all of the local authorities within England which have responsibilities for minerals planning (Mineral Planning Authorities – MPAs) are required to plan for a steady and adequate supply of aggregates by: preparing an annual Local Aggregate Assessment, either individually or jointly, to forecast future demand, based on a rolling average of 10 years' sales data and other relevant local information, and an assessment of all supply options (including marine dredged, secondary and recycled sources); participating in the operation of an Aggregate Working Party and taking the advice of that party into account when preparing their Local Aggregate Assessment.
- 2.4. The NPPF also states that MPAs should “so far as practicable, take account of the contribution that substitute or secondary and recycled materials and minerals waste would make to the supply of materials, before considering extraction of primary materials, whilst aiming to source minerals supplies indigenously” (paragraph 210).
- 2.5. National Planning Practice Guidance confirms that a Local Aggregate Assessment should contain three elements:
 - a forecast of the demand for aggregates based on both the rolling average of 10-years sales data and other relevant local information;
 - an analysis of all aggregate supply options, as indicated by landbanks, mineral plan allocations and capacity data. This analysis should be informed by planning information, the aggregate industry and other bodies such as local enterprise partnerships;
 - and an assessment of the balance between demand and supply, and the economic and environmental opportunities and constraints that might influence the situation. It should conclude if there is a shortage or a surplus of supply and, if the former, how this is being addressed.
- 2.6. In addition to the Government's planning practice guidance it should be noted that the Planning Officers' Society and the Mineral Products Association jointly published a Practice Guidance Document on the Production and Use of Local Aggregate Assessments in April 2015, updated in May 2017. Although non-

statutory this document sets out good practice and provides a useful health check to ensure the robustness of an LAA.

- 2.7. This LAA document has been prepared in accordance with the guidance referred to above and represents the ninth LAA for the County of Leicestershire. The LAA sets out the current supply of and demand for aggregates in the County and indicates the provision that will be needed to ensure that Leicestershire continues to make an appropriate contribution to the steady and adequate supply of aggregates.
- 2.8. The Leicestershire Minerals and Waste Local Plan (up to 2031) was adopted by Leicestershire County Council on 25th September 2019. This LAA is part of the evidence base to inform the review of the Leicestershire Minerals and Waste Local Plan. Revised LAAs will be produced annually as part of the Local Plan monitoring procedures.
- 2.9. The LAA is submitted to the East Midlands Aggregates Working Party (EMAWP), an advisory body made up of MPAs across the region, for consideration and scrutiny. The AWP has a role to monitor the operation of the MASS through providing technical advice, particularly on supply provision.
- 2.10. Policy M1 (Supply of Sand and Gravel Aggregate) of the Plan indicates the level of provision to be made for sand and gravel aggregate within Leicestershire over the period 2015 to 2031, is 19 million tonnes, with an annual requirement of 1.12 million tonnes.
- 2.11. Policy M4 (Crushed Rock) of the Plan indicates the level of provision to be made for crushed rock for aggregate purposes within Leicestershire over the plan period, is some 231 million tonnes, with an annual requirement of 13.6 million tonnes.

3. Types of aggregate produced in Leicestershire

Sand and Gravel

- 3.1. In Leicestershire, sand and gravel for aggregate use is sourced from two distinct types of deposit, namely sub-alluvial and river terrace; and glaciofluvial.
- 3.2. The main sources of sub-alluvial and river terrace deposits in Leicestershire are Quaternary and Recent age deposits in the valleys of the Rivers Trent, Soar and Wreake. Similar, but smaller areas, of sand and gravel are also associated with the River Sence and the Rivers Avon and Welland along the southern borders of Leicestershire.
- 3.3. A series of isolated Glaciofluvial deposits occur in areas to the south and west of Leicester. The full extent of this resource is unknown, however, as areas of wholly concealed bodies of sand and gravel may occur under spreads of till and other drift deposits. The extensive boulder clay and other drift deposits which cover central and eastern parts of Leicestershire may conceal potential deposits.

- 3.4. Deposits of solid sand and gravel sources in the form of the Triassic Bunter Pebble Beds occur in two areas in the north-west of Leicestershire, around Measham and Castle Donington. Blown sand deposits resulting from aeolian reworking of river and glacial deposits and bare Triassic bedrock occur in the Vale of Belvoir.
- 3.5. The deposits will be considered collectively under the term “sand and gravel” in the rest of this report.

Igneous Rock

- 3.6. Outcrops of Precambrian/Cambrian igneous rocks occur in Charnwood Forest and in south Leicestershire. Within Charnwood Forest, the intrusions form two main groups: a southern group around Markfield, Bradgate and Groby; and a northern group, which extends towards Shepshed. Volcanic lavas of Precambrian origin occur in exposed masses around Bardon Hill, High Sharpley and Pedlar Tor. Igneous rock intrusions also occur around Mountsorrel, and at locations to the south-west of Leicester, including Enderby, Earl Shilton, Huncote, Stoney Stanton and Sapcote.

Limestone

- 3.7. In north-west Leicestershire, Carboniferous limestones crop out in several small, isolated inliers which locally form prominent hills above the surrounding Triassic rocks near to the Leicestershire/Derbyshire border. The inliers between Breedon and Thringstone consist mainly of pinkish-yellow, bedded and massive dolomite (dolostone).
- 3.8. Lincolnshire Limestone of Jurassic age occurs in North East Leicestershire. The various limestone units making up the Lincolnshire Limestone form a relatively thick and persistent formation which produce aggregates, for uses such as fill and sub-base roadstone.

4. Current situation regarding land won aggregates in Leicestershire

Introduction

- 4.1. Production and sales data for aggregate minerals is collected on an annual basis, through an aggregate survey undertaken on behalf of the East Midlands Aggregates Working Party (EMAWP). Annually published EMAWP reports present data on production and reserves for the County. The most recent Aggregates Monitoring (AM) survey provides data for 2019.
- 4.2. Every fourth year Aggregate Working Parties conduct a major in-depth survey. This includes the collection of data on the distribution of sales. Data was previously collated and published in 2014. The latest national survey, the 2019 Aggregate Minerals Survey for England and Wales (2019 AMS) was undertaken by The British Geological Survey (BGS) in 2020. This forms the latest data available for use.

Land-won sand and gravel

- 4.3. In the study period there were three sites active in Leicestershire, at Brooksby (Borough of Melton), Lockington (North West Leicestershire District), and Shawell (Harborough District).

Sales

- 4.4. Sales of aggregate from sand and gravel operations within Leicestershire over the last 10 years are shown in Table 2 below. Data for the period 2011 to 2013 show the effects of the economic recession as production remained low, with sales of sand and gravel averaging 0.98 million tonnes per annum. Sales between 2014 and 2017 averaged 1.46 million tonnes per annum, around 49% higher than that experienced between 2011 and 2013, reflecting improvements in the economy and levels of construction. However, there was a downturn in sales in 2018 where sales were 20% lower than in 2017. Sales increased in 2019 to 1.25 million tonnes, some 6% higher than the previous year. However, sales plummeted in 2020 owing to the effects of the pandemic, including national lockdowns, and the temporary shutdowns of individual mineral extraction sites and construction sites. Sales figures in 2021 increased slightly following the low sales of 2020.

Table 2. Sales of Sand and Gravel 2012-2021.

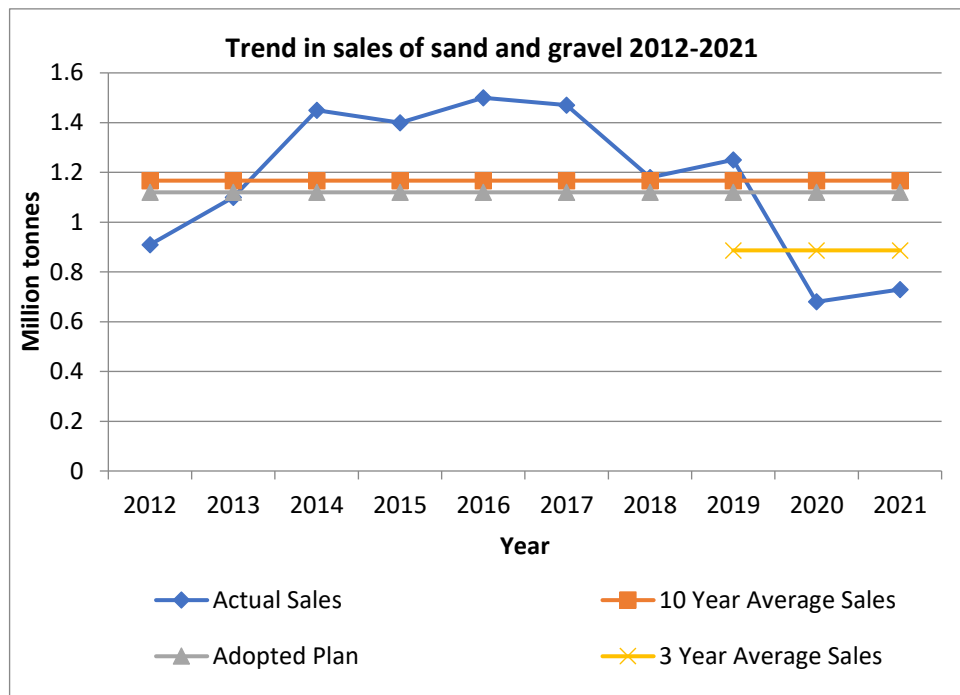
Year	Sales (Million tonnes)
2012	0.91
2013	1.1
2014	1.45
2015	1.4
2016	1.5
2017	1.47
2018	1.18
2019	1.25
2020	0.68
2021	0.73
Average	1.17

Source: EMRAWP Surveys

- 4.5. Average sand and gravel sales over the last 10 years were 1.17 million tonnes per annum. The national and local effects of the pandemic resulted in a dip in

sales during 2020. The low 2021 sales figure resulted in a fall in the average sales of sand and gravel over the past three years, to 0.89 Mtpa. This sales average falls short of the annual requirement set out in the adopted Leicestershire Minerals and Waste Local Plan 2019 (1.12 Mtpa) (see Figure 1 below). Sales for 2021 indicate a slight rebound following the effects of the pandemic, however the longevity of this upward trend into the subsequent years remains to be seen.

Figure 1. Sales of Sand and Gravel 2012-2021.



Landbank

- 4.6. Estimated permitted reserves of sand and gravel in Leicestershire at the end of 2021 were 2.83 million tonnes. The reserves will provide sufficient permitted material to last about 2.2 years based on the average rate of sales over the last 10 years (Table 14). An application for an extension at Lockington Quarry (reference 2019/2358/07) was submitted in 2020 and remains undetermined. During the reporting period, an application for further extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry was submitted in 2021 and remains undetermined (reference 2021/0683/03).

Production Capacity

- 4.7. In 2021 existing sites had a total potential production capacity of around 1.43 million tonnes per annum, which meant that they were theoretically capable of producing sufficient material to satisfy the level of provision identified in the adopted Minerals and Waste Local Plan. However, it should be noted that since 2020 there has been a loss of production capacity. Table 3 below provides information on the production capacity, potential reserves and permission end dates for sand and gravel sites within Leicestershire using publicly available information.

Table 3. Production Capacity of Sand and Gravel Sites.

Site	Status at time of publication	Production Capacity (tonnes p.a.)	Permitted Reserves**	Permission End Date at time of publication
Husbands Bosworth	Dormant	180,000**	6,000 tonnes	31-10-2021
Shawell	Active	600,000**	795,000	31-12-2044
Brooksby	Active	250,000*	1,303,000 tonnes	31-12-2026
Lockington	Active	400,000**	723,000 tonnes on 31 st December 2021.	02-12-2025
Total		1.43 Mt	2.83 million tonnes	

* Publicly available information (Sourced from the latest planning application documents for each site at time of publication).

** Information provided by operator, # date of reserves information given in brackets.

Exports and imports

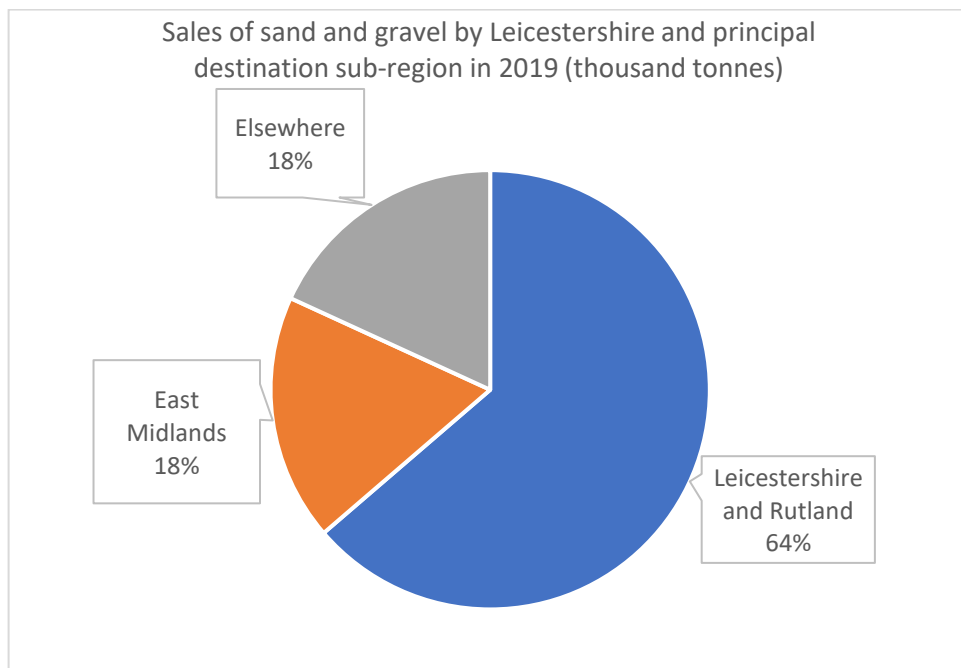
- 4.8. The Authority requested distribution data for 2021 from all mineral operators working within Leicestershire to provide an up to date understanding of the role that Leicestershire plays in supplying aggregates to various areas. However, as there is only one sand and gravel operator within the County it is not considered appropriate to publish this commercially sensitive information. Therefore, the data from the Aggregates Minerals Survey for England and Wales 2019 (2019 AMS) is used within this section. This data combines the counties of Leicestershire and Rutland.
- 4.9. The distribution of sand and gravel from the County in 2019 is set out in Table 4 and Figure 2 below. In 2019, sand and gravel operations within Leicestershire and Rutland predominantly served local markets. 64% of sales were within Leicestershire/Rutland. The remaining material travelled to neighbouring counties within the East Midlands region and 'Elsewhere' (18% went to each respectively). All the material was transported by road.

Table 4. Sales of sand and gravel by Leicestershire and principal destination sub-region in 2019

Destination Region	Thousand tonnes	%
Leicestershire and Rutland	793	64%
East Midlands*	226	18%
Elsewhere	226	18%
<i>Total</i>	<i>1245</i>	

Source: Table 9e of the Aggregates Minerals Survey for England and Wales 2019. The East Midlands region includes the areas of Derby City Council, Derbyshire County Council, Leicester City Council, Leicestershire County Council, Lincolnshire County Council, Northamptonshire County Council, Nottingham City Council, Nottinghamshire County Council, Peak District National Park and Rutland County Council. For Info: In order to summarise the large amount of data available, the table only shows for the MPA, sales by home sub-region and remaining sales in home region (excluding home sub-region). Unless otherwise stated, all other allocated sales to other regions are included under 'Elsewhere'.

Figure 2. Distribution of Sand and Gravel 2019.



- 4.10. Information on consumption by sub-region, as provided from the results of the 2019 AMS, indicate that Leicestershire/Rutland consumed 1,480,000 tonnes of sand and gravel in 2019. Separate figures for Leicestershire and Rutland are not provided and separate figures for the distribution of primary aggregates to individual destinations as detailed in the 2014 survey are also not provided. Imports of sand and gravel into Leicestershire and Rutland totalled 687,000 tonnes. In comparison to 2014 where imports were at 573,000 tonnes, this is a 20% rise in imports into the sub-region (see Table 5 below). Overall, Leicestershire/Rutland continued to be a net importer of some 235,000 tonnes of sand and gravel in 2019.

Table 5. Imports and consumption of Primary Aggregates in Leicestershire and Rutland in 2019.

Imports of Primary Aggregates by Leicestershire and Rutland in 2019 (thousand tonnes)

Land-won sand and gravel	Crushed Rock	Total Primary Aggregates
687	364	1052

Consumption of Primary Aggregates by Leicestershire and Rutland in 2019 (thousand tonnes)

Land-won sand and gravel	Crushed Rock	Total Primary Aggregates
1480	6504	7984

Source: Tables 10 and 11 of 2019 of the Aggregates Minerals Survey for England and Wales 2019.

Crushed Rock – Production Sites (active and inactive)

- 4.11. Igneous rock extraction within Leicestershire is currently taking place at 4 sites, namely Bardon; Cliffe Hill; Croft; and Mountsorrel (see Table 6 below). Whitwick and Groby quarries are currently inactive, although coating and concrete plants are maintained at Groby. Two carboniferous limestone quarries are operational within Leicestershire at Breedon on the Hill and Cloud Hill.

Table 6. List of Active Crushed Rock Sites during 2021 monitoring period.

Site	District	Mineral
Croft Quarry	Blaby	Igneous Rock
Mountsorrel Quarry	Charnwood	Igneous Rock
Cliffe Hill Quarry	Hinckley	Igneous Rock
Bardon Quarry	North West Leicestershire	Igneous Rock
Breedon Quarry	North West Leicestershire	Limestone
Cloud Hill Quarry	North West Leicestershire	Limestone

Sales

- 4.12. Sales of aggregate from crushed rock quarries within Leicestershire over the last 10 years are shown in Table 7 below. Sales of rock aggregate within the County in 2011 were 12.36 million tonnes, fluctuating until 2012 as a result of the economic recession. Sales from 2012 rose to a maximum of 14.34 million tonnes in 2017. Since then, sales have once again fluctuated, ranging between 13.88 and 10.72. The 2020 sales figure was 10.72 million tonnes per annum, a 23% decrease from the previous year owing to the pandemic. Since then, sales in 2021 rose to 12.28 million tonnes as markets re-opened and construction projects re-started. It remains uncertain whether this rise in sales will continue due to economic instability across global and national markets.

Table 7. Sales of Crushed Rock 2011-2020

Year	Sales (million tonnes)
2012	11.00
2013	13.08
2014	14.15
2015	13.45
2016	14.04
2017	14.34
2018	12.49
2019	13.88
2020	10.72
2021	12.28
Average	12.94

Source: EMRAWP Surveys.

- 4.13. Average crushed rock sales were 12.94 million tonnes over the last 10 years. Before the impacts of the pandemic, crushed rock sales from Leicestershire in 2020 were higher than the annual requirement set out in the recently adopted Plan (13.6 million tonnes) (see Figure 3 below). Since then, effects of the pandemic have been felt and sales dropped to their lowest for ten years, and below the annual requirement. The sales for 2021 indicate a rebound following the poor sales performance of 2020, however are still below the 10-year average and the provision set out in the Local Plan.

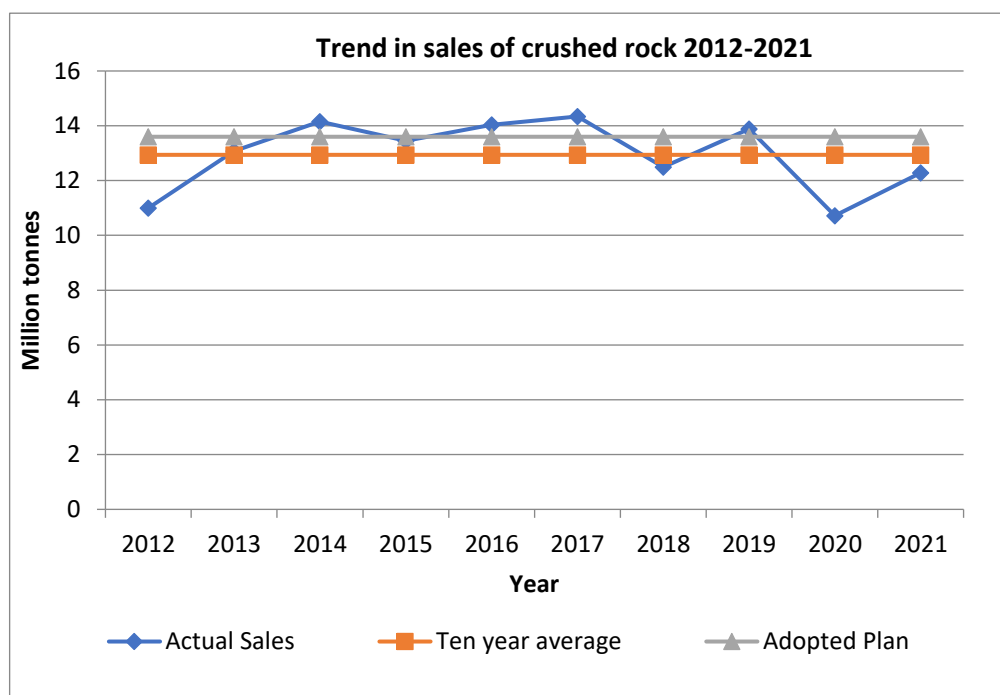
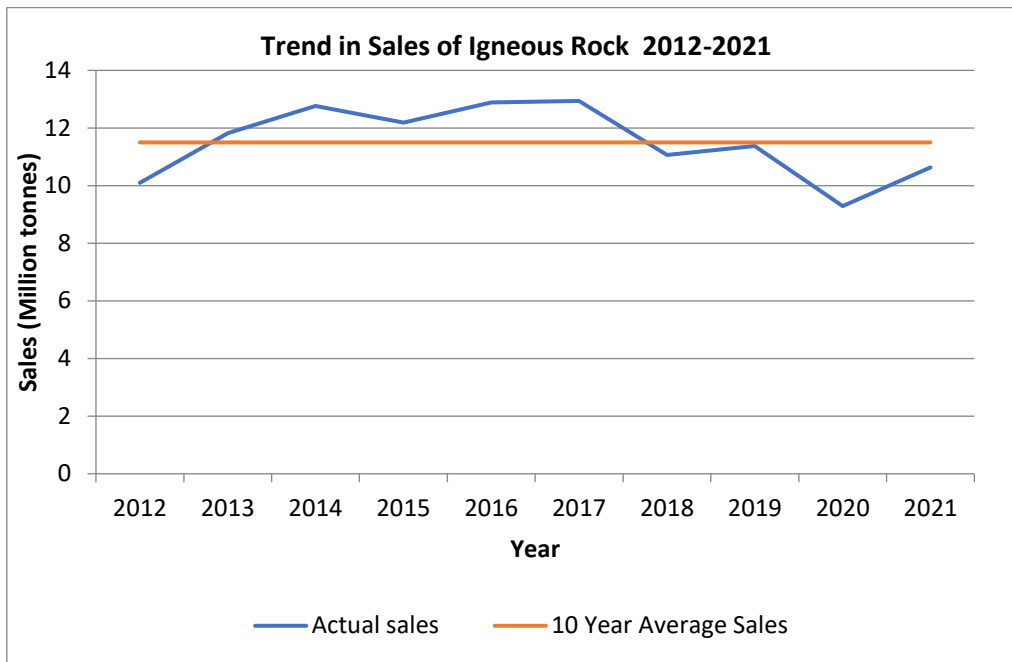


Figure 3. Sales of Crushed Rock 2012-2021.

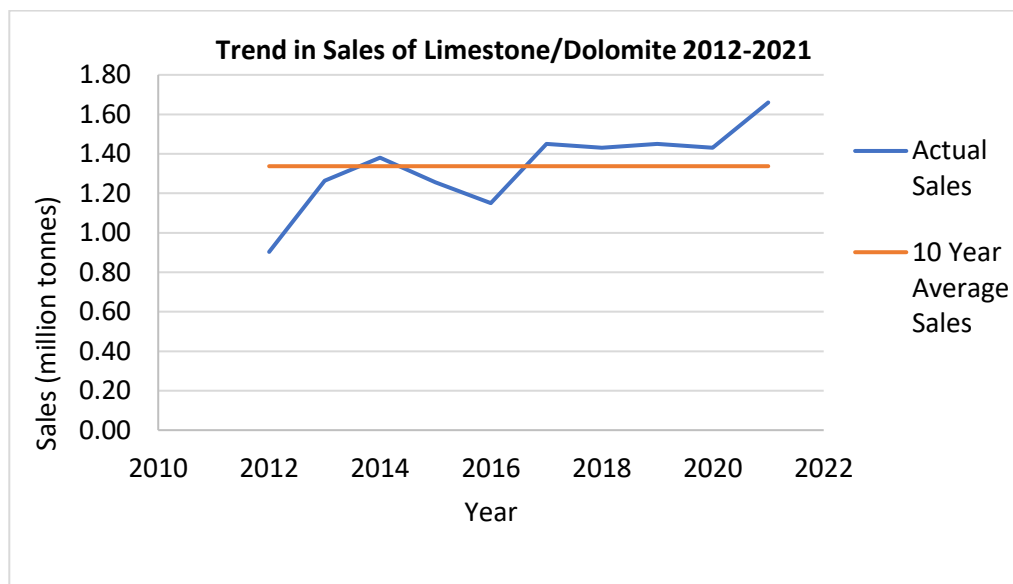
- 4.14. The four active igneous rock quarries together account for around approximately 65% of the igneous rock output in England. These quarries supply crushed rock aggregate of varying types, ranging from general purpose aggregate suitable for a wide range of end-uses including concrete production, to higher specification end-uses such as rail ballast and high PSV (Polished Stone Value) aggregate that is capable of being used in skid-resistant road surfacing applications. There are relatively few alternative sources of such High Specification Aggregate in England.
- 4.15. Average igneous rock sales from Leicestershire were 11.5 million tonnes per annum over the last 10 years and 10.43 million tonnes per annum over the last 3 years. Figure 4 below shows the general trend of sales of igneous rock within Leicestershire over the period 2012 to 2021. Sales were low in 2012 but subsequently increased until 2017. In 2018 sales dropped to around 2013 levels. The 2019 sales rose marginally compared with the previous year. In 2020 sales dropped to their lowest over the previous 10-year period, at 9.29 Mtpa. Sales in 2021 show a rebound following the pandemic, however, remain below the 10-year average. Overall, sales in igneous rock have fluctuated over the 10-year period largely owing to various episodes of economic instability.

Figure 4. Sales of Igneous Rock 2012-2021.



4.16. Average limestone sales within Leicestershire were 1.34 million tonnes per annum over the last 10-year period and 1.51 million tonnes per annum over the last three-year period. Figure 5 below shows the sales of limestone aggregate within Leicestershire over the previous 10-year period. Sales in 2021 proved to be the highest within the 10-year preceding period at 1.66 million tonnes following the pandemic.

Figure 4. Sales of Limestone 2012-2021.



Landbank

- 4.17. Estimated permitted reserves of crushed rock in Leicestershire as at the end of 2020 were around 344 million tonnes. This is sufficient permitted material to last about 26.6 years based the average rate of sales over the last 10 years.
- 4.18. Arithmetically, the level of permitted reserves for crushed rock in Leicestershire is well in excess of the 10-year minimum landbank for rock required by the NPPF. A significant proportion of the permitted reserves, however, are at inactive sites.
- 4.19. Estimated permitted reserves of igneous rock in Leicestershire as at the end of 2021 were around 312 million tonnes (See Table 9). This is sufficient permitted material to last about 24.1 years based upon the average rate of production over the last 10 years.
- 4.20. As at the end of 2021, the four active igneous rock quarries (which are all rail connected) had total reserves of some 179 million tonnes (see Table 9), a collective life of some 15.5 years based on the average rate of sales over the last 10 years. An application to extend Croft quarry was permitted in early 2022, outside the report period for an additional 6 million tonnes.
- 4.21. Estimated permitted reserves of limestone in Leicestershire as at the end of 2021 were around 35 million tonnes (See Table 8). This is sufficient permitted material to last 26.3 years based on the average rate of sales over the last 10 years.

Production Capacity

- 4.22. The existing active sites have the potential to produce around 15.5 million tonnes per annum, based on information contained in recent planning applications. Existing rail-linked quarries have a capacity of around 13.5 million tonnes per annum. This suggests that existing sites would be capable of producing sufficient material to satisfy the average rate of production over the last 10 years, but this would be below the level of provision identified in the adopted Minerals and Waste Local Plan (13.6 Mt per annum). Not all of the sites would however be able to continue contributing to future requirements without the benefit of extensions to their currently permitted operations. Table 9 below provides information on the productive capacity, potential reserves and permission end dates for crushed rock sites within Leicestershire (N.B. The 'production capacity' figures are only indicative and do not necessarily represent a maximum limit. Annual sales at some sites have exceeded that identified in planning applications).

Table 8. Production Capacity of Crushed Rock Sites

Site	Mineral	Operator	Status	Production capacity* (tonnes p.a.)	Reserves*#	Permission Date	End
Croft	Igneous Rock	Aggregate Industries	Active	2 million	0.4 Mt at 1/12/21 6.5 Mt following recent permission	22 years following commencement	
Mountsorrel	Igneous Rock	Tarmac	Active	4.5 million	62 Mt	31-12-2040	
Cliffe Hill	Igneous Rock	Midland Quarry Products	Active	4 million	17 Mt	31-12-2032	
Bardon	Igneous Rock	Aggregate Industries	Active	3 million	93 Mt	31-12-2051	
Grobby	Igneous Rock	Midland Quarry Products	Inactive	Inactive	90 Mt	31-12-2038	
Whitwick	Igneous Rock	Midland Quarry Products	Inactive	Inactive	8 Mt	21-02-2042	

Site	Mineral	Operator	Status	Production capacity* (tonnes p.a.)	Reserves*#	Permission End Date
Breedon	Limestone	Breedon Aggregates	Active	up to 0.5 million	20 Mt	31-12-2042
Cloud Hill	Limestone	Breedon Aggregates	Active	1.5 million	15 Mt	31-12-2025
				Total 15.5 million		

* Publicly available information (Sourced from the latest planning application documents for each site at the end of 2021).

date of reserves information given in brackets

Exports and imports

- 4.23. The Authority requested distribution data from 2021 from all mineral operators working within Leicestershire to provide an up to date understanding of the role that Leicestershire plays in supplying aggregates. Unfortunately, the Authority were not able to obtain all of the sales by destination distribution data for crushed rock from the operators as some of the operators did not have the systems in place to obtain the information requested. Without obtaining the distribution data from all the operators, the data which has been collected is therefore not representative and is not considered suitable for publication in the LAA. Therefore, the most recent data from the Aggregates Minerals Survey for England and Wales 2019 is used below.
- 4.24. The distribution of crushed rock from Leicestershire in 2019 is set out in Table 9 below. A significant quantity (56%) of crushed rock was exported from the county. Ten per cent of material was distributed to other authorities within the East Midlands. The main destinations for material exported beyond the East Midlands were the East of England (21% of total sales); London and the South East (8%); and the West Midlands (10%), see Figure 6.

Table 9. Sales of crushed rock by Leicestershire and principal destination sub-region in 2019.

Region	thousand tonnes	%
Leicestershire and Rutland	6140	44
East Midlands	1382	10
South West	144	1
South East	709	5
London	434	3
East of England	2857	21
West Midlands	1388	10
North West	356	3
Yorkshire & Humber	469	3
Elsewhere	18	0
Total	13 896	

Source: Aggregates Minerals Survey for England and Wales 2019.

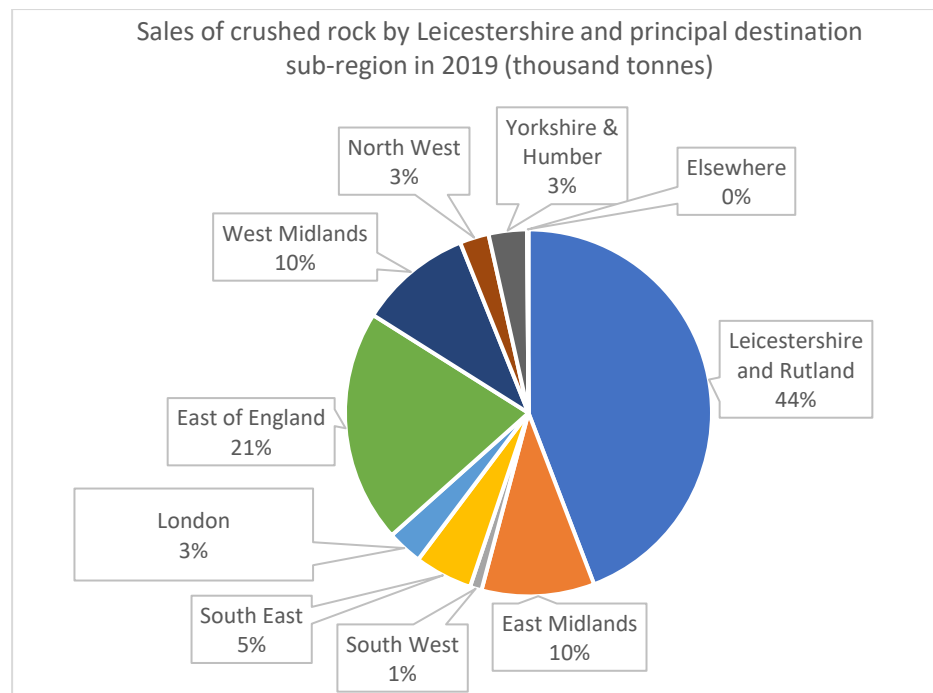


Figure 5. Sales of crushed rock by Leicestershire and principal destination sub-region in 2019 (thousand tonnes). Source: Aggregates Minerals Survey for England and Wales 2019

5. Recycled/Secondary Aggregate

- 5.1. Recycled Aggregate, which includes inert materials such as concrete, stone, brick and other similar materials, are reprocessed materials previously used for construction purposes and which are often taken from the Construction, Demolition and Excavation (CD&E) waste stream. Secondary aggregates are by-products of other industrial processes and will not have been used previously as aggregates.
- 5.2. The use of secondary and recycled materials not only reduces the requirement for new production of primary aggregate, but also reduces the need for disposal to landfill of CD&E waste materials. National Policy recognises the role of secondary and recycled materials as an alternative to primary aggregate.
- 5.3. Data on secondary and recycled aggregate production and use is variable and incomplete. The reason being some sites operate under license and can be monitored but much recycling and re-use occurs on individual construction sites and is temporary in nature and does not produce data. The Environment Agency's Waste Data Interrogator is used to identify the amount of CD&E waste produced and handled within each Waste Planning Authority.
- 5.4. At a national level, the Aggregates Minerals Survey for England and Wales 2019 survey was not confined to primary aggregates. It also collected sales data on aggregates which originate as a by-product of other quarrying operations – secondary aggregates. These principally included china clay waste and slate waste. Across England and Wales a total of 2.4 Mt of such alternative aggregates were sold in 2019. The equivalent total in 2014 was 2.3 Mt.

- 5.5. The Leicestershire Minerals and Waste Local Plan (adopted 2019) identifies and safeguards a range of waste facilities across three boroughs to maximise recycling, divert waste from landfill and create a range of 'green' jobs. It deals with all varieties of waste including construction, demolition and excavation waste (CDEW).
- 5.6. The information contained in the Waste Needs Assessment 2017 which supported the Local Plan states Leicestershire produces approximately 1.8 million tonnes of construction, demolition and excavation waste annually. This figure is based on estimates from national surveys. The Waste Data Interrogator identifies Leicestershire produced just over 0.9Mt of CDEW and handled nearly 1.1Mt in 2019. Caution should be used when considering these figures due to limitations of the data.
- 5.7. The 2019 Plan forecasts a fairly constant level of growth at less than 0.6% per annum suggesting that the amount of CDEW will remain below 2 million tonnes by 2026.
- 5.8. Despite difficulties in obtaining reliable data (even for a single year, let alone an historic series), the National and Regional Guidelines for Aggregates Provision have set figures for "Alternative Aggregates" (aggregate materials other than land or marine won) which regions should aim to achieve. The latest Guidelines propose that the East Midlands provide some 110 million tonnes of alternative aggregates for the period 2005–2020.
- 5.9. Several national surveys have been conducted to measure and gain an understanding of the extent to which recycled and secondary materials have been used. The most recent study, undertaken by Capita Symonds for 2005 arisings, was published in February 2007.
- 5.10. Lessons learned during the earlier surveys mean that the findings of the 2005 survey were considerably more robust at regional level. However, at sub-regional level they remained unreliable. The estimate for production of recycled aggregate in Leicestershire and Rutland in 2005 was 697,252 tonnes. In addition, 60,194 tonnes of recycled soil (excluding topsoil) was produced and re-used.
- 5.11. There is currently no audited data available to the Council with regards to tonnages of construction demolition and excavation (CD&E) waste arising in Leicestershire. A large proportion of construction and demolition waste is recycled on construction sites using mobile processing plant. Operational stand-alone permanent construction and demolition (C&D) recycling sites within Leicestershire are set out in Table 10 below. Existing recycling capacity for C&D waste in Leicestershire is estimated to be around 860,000 tonnes. There are currently no industrial processes in Leicestershire which are known to produce 'secondary' aggregates. The sites and facilities which produce recycled aggregates as set out in Table 11 below are safeguarded as part of the Local Plan. Additionally, outside of the reporting period, in 2021 planning permission was granted for a waste transfer facility at Bardon Hill Industrial Estate. When operational, the development would have the capacity to produce some recycled aggregate materials through the importation and recycling of 100,000 tonnes of varying materials per annum. Additionally, in 2021 planning permission was granted for the recycling and importation, processing, storage, and sale of inert materials to supplement primary aggregate at Bardon Quarry. Once operational, the development would

produce recycled aggregate materials through the importation and recycling of 300,000 tonnes of materials per annum. These will be chemically stable, inert materials including Incinerator Bottom Ash (IBA), spent railway ballast, foundry sands and construction and demolition waste streams.

- 5.12. The Authority requested sales and processing capacity data for recycled and secondary aggregates for 2021 from all mineral operators working within Leicestershire to provide an up to date understanding of the role that Leicestershire plays in producing and supplying these materials. Unfortunately, this data was not supplied by sites and so no data is available for 2021.
- 5.13. The lack of data will make it difficult to monitor the use of secondary and recycled materials at the local level, but available evidence does not suggest that there will be any significant alteration to the proportion of supply from these sources.

Table 10. List of Operational C&D Recycling Sites (as of date of publication of this report).

Site, (District)	Summary of operations
1. Croft Quarry, Huncote (Blaby)	Recycling of inert waste materials to supplement primary aggregate use
2. Granite Close, Enderby (Blaby)	Waste transfer recycling including C&D waste
3. Enderby Road, Whetstone (Blaby)	Waste transfer recycling including C&D waste
4. Granite Way, Mountsorrel (Charnwood)	Waste transfer recycling including C&D waste
5. Ingleberry Road, Shepshed (Charnwood)	Waste transfer recycling including C&D waste
6. Mountsorrel Quarry (Charnwood)	Wash plant facility
7. Wanlip Plant Site, A46, Syston (Charnwood)	Waste transfer recycling including C&D waste
8. Gilmorton Lodge Farm (Harborough)	Waste transfer recycling including C&D waste
9. Cliffe Hill Quarry (Hinckley & Bosworth)	Recycling of waste road construction material
10. Glebe Farm, Sibson (Hinckley & Bosworth)	Recycling facility
11. Groby Quarry (Hinckley & Bosworth)	Recycling of waste road construction material
12. Lynden Lea, Hinckley (Hinckley & Bosworth)	Waste transfer recycling including C&D waste
13. Orston Lane, Bottesford (Melton)	Waste transfer recycling including C&D waste
14. Harrison Close, Wigston (Oadby & Wigston)	Waste transfer recycling including C&D waste
15. Ellistown Quarry (North West Leics.)	Inert waste materials recycling operations

Site, (District)	Summary of operations
16. Lockington Quarry (North West Leics.)	Inert waste materials operations recycling
17. Wiggs Farm, Wood Road, Battram (North West Leics.)	Waste transfer recycling including C&D waste

5.14. Whilst the data currently available is not considered to be suitably robust to enable a recycling target to be set for Leicestershire, the recently adopted Leicestershire Minerals and Waste Local Plan demonstrates strong support by the Council for aggregate recycling. Thus, the adopted Leicestershire Minerals and Waste Local Plan also indicates that the County Council will support proposals for the recycling and reprocessing of materials for use as aggregates in appropriate locations.

5.15. The general trend in respect of inert recovery is for decreasing disposals of CD&E waste to landfills, quarries and exempt facilities and an increasing diversion of waste, especially through recycling. This will lead to a greater provision of CD&E waste as recycled aggregate assisting the Council in working towards future recycled aggregate production requirements and achieving a reduction in the demand for primary aggregate.

6. Future Provision

6.1. The Leicestershire Minerals and Waste Local Plan (Adopted 2019) provides an indication of the likely future provision up until 2031 (see paragraphs 1.10 and 1.1 above).

6.2. The starting point for setting a production guideline for aggregates in the LAA is to estimate demand on the basis of a rolling average of 10 years sales data (the 10-year average) before considering other relevant local information. The 10-year average is 1.19 million tonnes per annum for sand and gravel and 12.94 million tonnes per annum for crushed rock.

Sub regional apportionment

6.3. An indicator to be taken into account in identifying the level of future provision is the sub-regional apportionment derived from the National and regional guidelines for aggregates provision in England. The latest guidelines were produced to cover the period for 2005-2020 and set out the level of provision which should be made by each Region.

6.4. An annual "sub-regional apportionment" was produced from the 2005-2020 Guidelines by the East Midlands Aggregates Working Party (EMAWP). For Leicestershire, this was 1.51 million tonnes of sand and gravel and 16.6 million tonnes of crushed rock. This sub-regional apportionment is 76% higher than the 2020 sand and gravel sales figure and 43% higher than the 2020 crushed rock sales figure. It is noted that the sales figures from 2021 are not solely representative of the market nor future demand given the effects of the pandemic, however it should also be noted that the level of production outlined by the sub-regional apportionment has not been

achieved in Leicestershire during the last 10 years for either sand and gravel or hard rock.

- 6.5. At the meeting of the East Midlands Aggregates Working Party in February 2013, doubts were expressed about the validity of the apportionment guidelines. It was considered that the figures were out of date, as they were based on aggregate output from a period of economic growth, and that they should consequently not be taken into account in identifying future levels of provision. It was agreed that future levels of provision be based on a rolling average of 10 years sales data and other relevant local information, in accordance with the NPPF.
- 6.6. In the Inspector's Report on the partial review of the Northamptonshire Minerals and Waste Local Plan, the Inspector stated "as they (the national guidelines) were based on production before the recession and within a different policy context, it would not be prudent to accord them very significant weight." This suggests that it would not be appropriate to base the production guideline in this LAA on the National and regional guidelines or the sub-regional apportionment.
- 6.7. The Inspectors report noted that the use of average sales over a 10-year period to quantify the amount of sand and gravel required over the Plan period is suitable and consistent with the approach set out in the NPPF provided that it is also based on the average of 10-year sales in addition to other relevant local information.
- 6.8. Previous increases in sales of sand and gravel which were seen in the years previous to 2020 and the coronavirus pandemic, were not found to be reflective of housing construction rates within the County (see previous LAA reports for further information). Additionally, the most recent data (2019) indicates approximately 36% of sand and gravel production annually is exported out of the County. Therefore, sales may not necessarily correlate with economic activity within Leicestershire. Consequently, it is not considered necessary to depart from 10 years sales data when forecasting future aggregate provision.

Comment on providing a landbank

- 6.9. The NPPF identifies that provision should be made for a landbank of at least seven years for sand and gravel and at least 10 years for crushed rock. National guidance does not state that plans have to allocate sites to account for a landbank at the end of the plan period. Acceptable alternative approaches are to have an enabling policy that allows unallocated sites to come forward to ensure an adequate supply is maintained should the landbank be likely to reduce below the seven (sand and gravel) or 10-year (hard rock) periods or to undertake a review of the plan. The landbank position would be monitored annually through the AMR.
- 6.10. Policies M1 and M4 identify the Council's intention to maintain at least the seven and 10-year landbanks. Policies M3 and M4 allow for new proposals for sand and gravel and crushed rock where, amongst other things, they are required to maintain the landbank. Therefore, adequate provision is made in the Plan, in particular by Policies M3 and M4, and subject to a statutory required review of the Plan, pursuant to the requirements of The Town and Country Planning (Local Planning) (England)

(Amendment) Regulations 2017, or as considered necessary as a consequence of the AMR.

Recent trends

- 6.11. An average of the last three years' sales gives an indication of the most recent sales trends to identify the general trend of demand.
- 6.12. Average sand and gravel sales over the last three years were 0.89 million tonnes per annum, 24% lower than the 10-year average (1.17). The trend highlighted by the three-year average for sand and gravel warrants consideration of whether it would be appropriate to alter the production guideline from the 10-year average. This is considered in the text below.
- 6.13. Average crushed rock sales over the last three years were 12.29 million tonnes, about 5% lower than the 10-year average (12.94 million tonnes). This recent minor fluctuation in sales suggests that it is not significant enough to indicate that it would be appropriate to alter the production guideline from the 10-year average.

Local Factors

- 6.14. The NPPF states that the annual Local Aggregate Assessment should be based on a rolling average of 10 years' sales data and other relevant local information. In respect of the latter, the following issues have been addressed: supply and demand from neighbouring authorities; population forecasts; household projections; future house building; local economic objectives; and major infrastructure projects. The bulk of the analysis in this section focuses on Leicestershire and Leicester.
- 6.15. The most recent data on the distribution of sand and gravel from the County in 2019 is provided by the Aggregate minerals survey for England and Wales, 2019. In 2019, sand and gravel operations within Leicestershire and Rutland predominantly served local markets. 64% of sales were within Leicestershire/Rutland. The remaining material travelled to neighbouring counties within the East Midlands region and 'Elsewhere' (18% went to each respectively). All the sand and gravel, a total of 7 million tonnes was transported by road out of the East Midlands in 2019 (see Table 11 below).

Road			Rail		
Sand and gravel	Crushed rock	Total	Sand and gravel	Crushed Rock	Total
7064	20153	27577	0	8650	8650

Table 11. Sales of primary aggregates by principal transport method in 2019 in the East Midlands (thousand tonnes). Source: Aggregates Minerals Survey for England and Wales 2019.

- 6.16. It is recognised that some sand and gravel sites within the county lie close to the border of neighbouring authorities and that 36% of sales of sand and gravel were supplied to markets in neighbouring authorities. It is expected that unless extensions to existing sites or new sites are granted planning permission, in the medium to long term future, Leicestershire will struggle to continue to maintain a supply of sand and gravel to meet demands in neighbouring authorities. Likewise, Leicestershire will become more reliant on neighbouring authorities for sand and gravel. The Leicestershire Minerals and Waste Local Plan (up to 2031) which was adopted on the 25th September 2019 allows for additional provision to be made from unallocated areas and extensions to existing sites, provided certain criteria are met. In 2019 a planning application was submitted for the extraction of 3.3 million tonnes of sand and gravel at Lockington Quarry. Additionally, although outside of the reporting period for this LAA, a planning application has been submitted for the extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry. Notwithstanding this, the cross-boundary supply and demand of sand and gravel as well as the demand within Leicestershire will continue to be monitored through Local Aggregate Assessments, both Leicestershire's and those of neighbouring authorities and through the Local Plan review process.
- 6.17. Comments received during the production of the 2020 LAA raised concerns that as sand and gravel sites within the county close as reserves run out then there will be a slowdown in production to manage reserves and site closures. This in turn would affect the sales figures which would be reported within the LAA and may appear as an indicator of falling demand, where actually there may be reserve and resource shortfalls. Continued monitoring will identify if this trend continues or if sales will pick up again. However, should it be considered that a drop in sales has occurred due to a lack of reserves rather than a lack of demand and local factors and demands warrant it, consideration will be given to applying an uplift figure to the sand and gravel provision figure. At present this is not considered necessary.
- 6.18. Table 12 below shows population and household projections from 2011 to 2036 in Leicester & Leicestershire, the East Midlands and England from the ONS/CLG 2014-based Population and Household Projections. The data shows that the population of Leicester & Leicestershire is projected to grow by 19.5%, which is above that projected across the region (16%) and for England as a whole (17.5%). Households within Leicester & Leicestershire are expected to grow by 20.7%, which is faster than the growth expected across the region (17.2%) and nationally (19.9%).

Table 12. Population and Household Projections (2011-2036).

	Population 2011	Population Growth 2011- 36	% population growth	Change in households	% Household Growth
Leicester & Leicestershire	980,806	191,562	19.5%	80,778	20.7%
East Midlands	4,537,448	733,508	16.2%	335,623	17.7%
England	53,107,169	9,296,778	17.5%	4,394,788	19.9%

6.19. A steady and adequate supply of aggregates will be crucial to enabling the level of planned housing development to be delivered. The Mineral Products Association states that the construction of a typical new house uses up to 50 tonnes of aggregates from the foundations through to the roof tiles. This is a generalisation which should be treated with a degree of caution and does not distinguish between use of sand and gravel and crushed rock and does not include any requirements for infrastructure supporting housing development or the significant amount used in maintaining or refurbishing existing housing stock. There are no figures available to indicate the level of demand other types of development might create.

6.20. Considering levels of planned housing development could still provide an indication of whether demand for aggregates is likely to significantly increase or decrease. A comparison of sand and gravel sales against housing completions in the county since 2006/07 is shown in Figure 7 below. Any relationship should be treated with some caution given the amount of mineral that is exported out of the County. It would be prudent however to continue to examine trends in sand and gravel sales and housing completions in future LAAs.

6.21. In February 2016 GL Hearn along with Justin Gardner Consulting and Oxford Economics were appointed by the local authorities and the local enterprise partnership in Leicester and Leicestershire to undertake a Housing and Economic Development Needs Assessment (HEDNA) for the area to replace the 2014 Strategic Housing Market Assessment and the 2013 Leicester & Leicestershire Employment Land Study.

6.22. The HEDNA report was published on 27th January 2017. The report identifies an Objectively Assessed Need for Leicester and Leicestershire, based on demographic

analysis, of some 96,580 dwellings for the period 2011-31 (4,829 dwellings per annum). For the period 2011-2036, the figure is some 117,900 dwellings (4,716 dwellings per annum).

- 6.23. The nine local authorities and the LLEP jointly agreed a Strategic Growth Plan, a non-statutory strategic plan looking forward to 2050. The final Strategic Growth Plan was approved in December 2019. This includes an estimate of the likely scale of growth for the period 2031-50, an estimated 90,516 dwellings (4,764 dwellings per annum).
- 6.24. The HEDNA also included detailed work to interrogate future economic growth potential in Leicester and Leicestershire. GL Hearn and Oxford Economics have interrogated the area's economic structure and past performance, assessed baseline econometric forecasts from Oxford Economics Local Authority District Forecasting Model and overlaid local economic drivers and planned investment on this to derive a Planned Growth Scenario.
- 6.25. The Planned Growth Scenario sees employment growth in Leicester and Leicestershire of 99,200 between 2011 and 2036, representing growth of 0.7% pa, matching that expected nationally and exceeding regional performance. This significantly exceeds the historical growth rate of 0.4% pa (1993-2010).
- 6.26. The Leicester & Leicestershire Enterprise Partnership's (LLEP) Strategic Economic Plan sets out strategic objectives, priorities and actions for the period 2011 to 2031/2036 and also the period 2031/36-2050 although it is recognised that future forecasting will require further research for accurate forecasting.
- 6.27. The Midlands Engine Strategy was published in March 2017. This sets out Local Growth Fund investment of £392 million for skills, connectivity and local growth in the region, of which £25.87 million is allocated to the Leicester and Leicestershire LEP. Specific projects include £14 million to develop a global space technologies hub in Leicester, and £12 million to improve transport connections in and around Loughborough.
- 6.28. In January 2012, the Government announced its decision to proceed with a £32.7 billion national High-Speed Rail network (High Speed Two) from London to Birmingham, continuing onto Manchester and Leeds. The route for HS2 phase two as updated in November 2021 lies partly within Leicestershire. Main construction work on Phase 1 between London and the West Midlands has started. Construction of Phase 2 from the West Midlands to Manchester and East Midlands Parkway is scheduled to begin in 2023. In October 2021, the Department for Transport released indicative figures of the aggregate which would be required for various stages of the project. It is difficult to apportion how much would be required to be supplied from different regions and this will be easier to calculate once the information has been further refined.
- 6.29. The North and East Melton Mowbray Distributor Road to relieve congestion in Melton Mowbray, Leicestershire and to support plans for housing and employment growth was granted planning permission on the 23rd May 2019. It is currently anticipated that the main construction works will finish mid-2023. Given the scale and location of the

project, it is considered that the road will have a greater than local influence on aggregate demand in the short-term which should be considered.

- 6.30. A formal application to the Secretary of State for a Development Consent Order has yet to be made for the Hinckley National Rail Freight Interchange (HNRFI) at junction 2 of the M69, within the district of Blaby, Leicestershire. The site is proposed to include industrial and Storage/Distribution units, a rail port and the lorry park, dedicated road access directly from Junction 2 of the M69 and associated highway works and landscaping including footpath and cycle links. The scheme would be a Nationally Significant Infrastructure Project and given its scale it is considered that the project would result in a greater than local impact on aggregate demand in the short to medium term although it is difficult to apportion how much would aggregate would be required to be supplied. Further analysis and monitoring of its likely impact on local aggregate demand will be undertaken in subsequent aggregate assessments as further information on timescales for the project come forward.

Conclusion

- 6.31. Recent trends in production for sand and gravel, together with the local factors referred to above, suggest that there may be demand for sand and gravel from Leicestershire operations over and above the average experienced during the last 10-year period (2012 to 2021). The rise in sales in 2019 has previously indicated increased demand. The sales data for 2020 and 2021 have been significantly impacted by the impact of the effects of pandemic. Additionally, those sites which became dormant and were not yet replaced by either extension to existing sites or new sites becoming active have also resulted in a downturn in sales. This does not necessarily indicate a lack of demand; indeed, the substantial net import of sand and gravel in 2019 identified in the AMR would suggest otherwise. Ongoing monitoring is required.
- 6.32. Outside the scope of this report, planning applications have been submitted for three sand and gravel quarry extensions, namely at Husbands Bosworth and Lockington.
- 6.33. There are increasing signs of problems regarding the provision of further sand and gravel resources, as witnessed by the low landbank, the low number of new applications being submitted, the limited number of sites allocated in the newly adopted Leicestershire Minerals and Waste Local Plan which resulted from a lack of sites being put forward by industry during the submission stage. Future sales may consequently be influenced by mineral reserve continuity at individual quarry sites. Despite the rise in annual sales in 2019, the implications of the Covid-19 pandemic have to be considered. Whilst sales figures have been greatly affected as a result of the pandemic, it is considered that the economy will rebound. As such, the Local Aggregates Assessment for the monitoring period of 2022 will continue to address the ongoing impact on the aggregate industry. Given the large drop in sales during 2020 and 2021 skewing the three-year average sales figure to its lowest ever figure (0.89 Mtpa), it is considered appropriate for the production guidelines identified by this Local Aggregates Assessment to reflect the 10-year sales average, namely 1.17 million tonnes per annum. It is considered that this would better reflect the expectation that the economy will rebound and planned local and national housing and infrastructure construction projects will continue as previously planned.

6.34. The importance and current distribution of Leicestershire's crushed rock means that it is likely that the County's rock quarries will continue to supply major infrastructure both in the East Midlands and elsewhere in England. The scale of any potential increase in demand is uncertain and will largely depend on the rate of future growth in the national and local economy. Further to the rise in annual sales in 2019, the implications of the Covid-19 pandemic have to be considered. Whilst the UK has seen economic decline as a result of the pandemic, there are indications that the market will rebound as a result of demand for construction projects. The Local Aggregates Assessment for 2023 will continue to monitor and address the impact on the aggregate industry. Overall, it is not considered there is sufficient robust evidence to support a specific level of production above the 10-year average of sales. The production guidelines identified by this Local Aggregates Assessment therefore reflect the 10-year sales average, namely 12.94 million tonnes per annum, a decrease of 0.01 million tonnes over 10-year average up to the end of 2020.

Sand and Gravel Provision

6.35. Table 13 below provides revised calculations of the potential future requirement for sand and gravel within Leicestershire based on average sales over the last 10 years. The calculations are based on making provision for the period up to 2031. The calculations take account of the level of permitted reserves on 31st December 2021.

Table 13. Calculation of Sand and Gravel Provision 2020 – 2031

Calculation		Million Tonnes
A	Annual Requirement	1.19
B	Total Requirement 2020-2031*	13.09
C	Total permitted reserves at 31/12/2021	2.53
D (C-B)	Shortfall 2020 – 2031	10.56

*Total Requirement = A x 11 years

6.36. The table indicates that there will be a shortfall of sand and gravel reserves over the period to 2031 of some 10.56 million tonnes, and increase of some 0.46 million tonnes over 2021. The Leicestershire Minerals and Waste Local Plan includes proposals for the extension of four of the active sand and gravel operations in the County. The majority of the remaining allocations at Husbands Bosworth Quarry, Cadeby Quarry and Shawell Quarry remain without planning permission, as of the date of publication of this report. A planning application has been submitted for the extraction of 900,000 tonnes of sand and gravel at Husbands Bosworth Quarry which is yet to be determined. Additional reserves of 431,000 tonnes of sand and gravel were permitted at Shawell Quarry in 2020 (reference 2019/1891/03) but areas of the allocations at Shawell Quarry. There is no intention for the remaining allocation at Cadeby to be worked due to limited mineral presence.

6.37. The Plan also provides for planning permission to be granted for sand and gravel outside unallocated areas under Policy M3: Sand and Gravel Extraction (Unallocated Areas). In 2019 a planning application was submitted for the extraction of 3.3 million tonnes of sand and gravel at Lockington Quarry, this application remains undetermined at present.

6.38. Planning permission was granted in 2015 for a new wash plant facility at Mountsorrel Quarry. It is estimated that the plant will produce around 310,000 tonnes of washed quarry fines per annum, which will be comparable with washed concrete sand produced at sand and gravel sites elsewhere. This product will reduce the need to import equivalent materials to supply ancillary production at the quarry (i.e. ready-mix and precast concrete plant).

Crushed Rock Provision

6.39. The Leicestershire Minerals and Waste Local Plan indicates there would be more than sufficient crushed rock reserves to meet requirements over the period to 2031. It was not therefore considered necessary to make specific provision for future rock extraction.

6.40. Table 14 below provides updated calculations of the potential future requirement for crushed rock from Leicestershire based on average sales over the last 10 years. The calculations are based on making provision for the period up to 2031. The calculations take account of the level of permitted reserves as of 31st December 2021.

Table 14. Calculation of Crushed Rock (Aggregate) Provision 2020-2031.

Calculation		Million Tonnes
A	Annual Requirement	12.94
B	Total Requirement 2020-2031*	142.45
C	Total permitted reserves, excluding reserves in dormant sites, at 31/12/2021	312.61
D (C-B)	Surplus 2020 – 2031	170.16

*Total Requirement = A x 11 years.

6.41. The table indicates that there will be more than sufficient crushed rock reserves to meet requirements up to 2031. The current level of permitted reserves is also sufficient to maintain a landbank of 10 years throughout the period to 2031, with a surplus of 170.16 million tonnes. This surplus demonstrates that any greater than local impact on demand for crushed rock in the short to medium term because of local factors would be able to be met, as it is unlikely that additional demand would outstretch the current surplus.

6.42. Whilst the theoretical permitted reserves of igneous rock appear to be adequate, technical considerations led the East Midlands Aggregates Working Party (EMAWP)

to express concern in 2018 regarding the medium to long term ability of Leicestershire to supply crushed rock, at existing levels, particularly to areas like the South East and London via rail. The EMAWP advocated that action be taken to address concerns over medium to long term future supplies of igneous rock from Leicestershire, bearing in mind the nationally strategic and uncertain nature of the Leicestershire resources beyond the existing permissions. In 2019 8.65 million tonnes of crushed rock were exported out of the East Midlands via rail.

- 6.43. This situation has also been recognised in a report from the British Geological Survey ('An evidence-based approach to predicting the future supply of aggregate resources in England' 2011) which concluded that "by far the most important foreseeable shortfall in the medium- to long-term is amongst the four rail-connected igneous quarries in Leicestershire."
- 6.44. The current strategy for aggregate minerals, set out in Policy M4 (Crushed Rock) of the Leicestershire Minerals and Waste Local Plan, is to ensure a steady and adequate supply of crushed rock for aggregate purposes by giving priority to proposals for extraction to be worked as extensions to existing rail-linked site operations where they are required to ensure sustainable supply and allowing proposals for new extraction sites where it has been demonstrated that the landbank and production capacity cannot be maintained from existing permitted sites. It should be noted that the Authority relies upon operators to come forward with proposals to ensure the medium-long term supply of crushed rock.
- 6.45. In August 2011, Leicestershire County Council granted planning permission for the extraction of 132 million tonnes of mineral from an area adjacent to Bardon Hill Quarry. This has extended the life of the quarry by around 40 years. The stone extracted at the quarry has a high PSV (60), enabling the aggregates to be used more extensively in road surfacing applications, as well as in other asphalt products, concrete and other uses.
- 6.46. Planning permission was granted in October 2015 for the extraction of an additional 20 million tonnes of mineral from an extension to Mountsorrel Quarry. This has extended the life of the quarry to 2040.
- 6.47. As of the 31st December 2020, planning permission at the rail-linked site at Croft expired at the end of 2029. On the 10th June 2021, it was resolved at committee to grant planning permission for a lateral extension to the mineral workings at Croft Quarry which would release an additional 6.3m tonnes of aggregate over 17 years.
- 6.48. Planning permission at the rail-linked Cliffe Hill Quarry currently expires at the end of 2032. However, it should be noted that outside of this monitoring period, a planning application for a lateral extension to the existing workings at Cliffe Hill Quarry has been submitted to the Authority in July 2022. This application is seeking the continuation of quarry workings beyond the current expiry date of 31st December 2032 to 31st December 2042. The application proposes to retain the existing processing and rail exporting infrastructure and operations on the site and proposes to release around 30 million tonnes of reserves. Additionally, a scoping opinion request was submitted to Leicestershire in August 2022 for a proposed lateral

extension to the existing rail-linked Mountsorrel Quarry. The submitted documents indicate that there remains approximately 58Mt of consented granite reserve at the quarry. Assuming an average production level of 4 Mt per annum, this is sufficient to last approximately 14.5 years, to 2037. The current permitted end date for quarry operations is 31 December 2040. To this end, the proposed development seeks northerly and south-easterly extensions of quarry working sufficient to release approximately 75 million tonnes of granite. Combined with consented mineral reserve, the development would extend the working life of the quarry by 18 years beyond the extant permitted mineral cessation date of 31 December 2040. The proposed development would extend the quarry life to 2058.

- 6.49. During the consultation process undertaken as part of this LAA, concerns were raised that exports of crushed rock from Leicestershire to London and the south-east which are nationally significant could rise over the next five years and that this could impact long term reserves of crushed rock within the County. At this stage it is difficult to quantify whether exports to London and the south-east will increase and this will also largely depend on future economic conditions. It is important to note the LAA is reviewed annually, and an Annual Monitoring Report is prepared by the County Council to monitor the effectiveness of the Local Plan.
- 6.50. Additionally, whilst the application at Cliffe Hill and the request at Mountsorrel remain undetermined it demonstrates that the policy environment is working effectively in that it has allowed proposals to come forward where required by operators and industry demand. An example of where this has occurred successfully is Croft Quarry. It is understood that the complexity of such proposals which result from not only the nature, but the sheer size of such proposals, can lead to delays where consideration of the planning balance and environmental considerations can take some time. However, these proposals have come forward to the Authority ahead of reserves dwindling which demonstrates the successful forward-planning of such operators in addressing these situations.
- 6.51. The bringing forward of these proposals demonstrates that the policies in place successfully allow for additional provision to be made from unallocated areas and extensions to existing sites provided certain criteria are met.
- 6.52. During the consultation process undertaken as part of this LAA, concerns have been raised that sand and gravel use within the County may be substituted by crushed rock should demand for sand and gravel outstrip supply. It is recognised that to some extent crushed rock can be used as an alternative to sand and gravel for some uses. The low landbank for sand and gravel within Leicestershire has been recognised within recent years and has been addressed through the call for sites as part of the Leicestershire Minerals and Waste Plan (Adopted 2019). Additionally, this has also been addressed similarly to crushed rock, through the use of flexible policies that allow sand and gravel sites in unallocated areas to come forward subject to environmental constraints. These policies allow industry to come forward with proposals where demand requires additional material.
- 6.53. As noted in previous LAAs, if production at any of the existing active sites cannot be maintained, it may be possible to use production capacity at sites that are currently

inactive in order to maintain the level of provision from quarries within Leicestershire. However, neither of the inactive sites in the County are rail-connected nor have they any realistic prospect of being linked by rail given their locality.